

Cosmetics Patents

February 2025



Empowering the science of beauty brands with the endorsement of a patent

The global cosmetics market has experienced incessant growth since 2004. The cosmetic global market value was USD 676.9bn in 2023 and was predicted to reach USD 716.2bn in 2024. The production of cosmetics and beauty products is dominated by several multi-nationals including L'Oréal, Unilever, Procter & Gamble Co., The Estee Lauder Companies, Shiseido Company, and Beiersdorf AG. Other key companies include Coty Inc., Natura & Co., Kao Corporation, Johnson & Johnson Services, Inc., and LVMH.¹

Over the past years, there has been an increased number of niche and challenger brands. However, very few beauty brands have scaled sufficiently to surpass USD 400m in global retail sales. Of a group of 46 brands with 2017 global retail sales of between USD 50-200m, only four brands scaled beyond \$400 million, and they are based in the world's largest beauty markets: Fenty Beauty and The Ordinary in North America, and Winona and Adolph in China.² These niche and challenger brands are now looking to scale, with a focus on building out international footprints and channels, and smart funding.

The beauty market has shown resilience against economic turbulence, while other consumer sectors have struggled, and this trend is expected to continue, as indicated in a report published by McKinsey in 2023³. The report indicates that key dynamics of the sector include:

1. A change in geographical growth strategies of beauty brands, with a slowing growth in China and the US market expected to be the biggest growth driver for multinational beauty brands over the next few years, whilst India and the Middle East are capturing attention of many beauty players.
2. A growing trend on wellness products to encompass a more holistic range of products. There has also been a growing trend in personalised skincare, and a shift in focus towards more eco-friendly, sustainable products.⁴ This has been further supported with changes in marketing trends, including the growth of internet marketing and social media.
3. The influence of the Gen-Z consumer habits, sharing some similarities with those of millennials, with a focus on authenticity and diversity.
4. Beauty remains an attractive consumer category for M&A due to its resilience and strong margins.

The report also comments that for newer entrants in the market, geographic and channel expansion is critical in gaining further market share.

1 [Statista: Cosmetics industry: Cosmetics Market Size, Industry Share, Global Trends, 2032 \(fortunebusinessinsights.com\); L'Oréal 2023 Annual Report](#)

2 [The beauty market in 2023: New industry trends | McKinsey](#)

3 [The beauty market in 2023: New industry trends | McKinsey](#)

4 [Microsoft Word - ML13-365.doc \(toknowpress.net\)](#)

Whilst **scientific innovation** has led to the development of many exciting new products, for small beauty companies that are relatively new to the scene, establishing themselves in what is a very competitive industry can appear daunting. Securing **patent protection** for innovative cosmetic products can be transformative. Patents not only prevent competitors from carrying out acts directed to the protected technology, for example marketing a protected product, but also enhance brand credibility, attract investors, and open up licensing opportunities.

In this article we investigate the trends in cosmetic patent filings over the past decade. We explore global patenting hotspots and reflect on why intellectual property considerations in the cosmetics industry is of paramount importance.

Growth of cosmetic patent filings in the world over the past 10 years

Over the past decade, the number of patent families relating to cosmetic preparations has greatly increased (see Figure 1). This increase which peaked in 2018 and in 2021 has been mostly sustained over the last five years. In contrast, the number of patent families in closely related fields have decreased to much lower levels.

Normalised Patent Families in the Medical or Veterinary Science and Hygiene Field vs Cosmetic Preparations

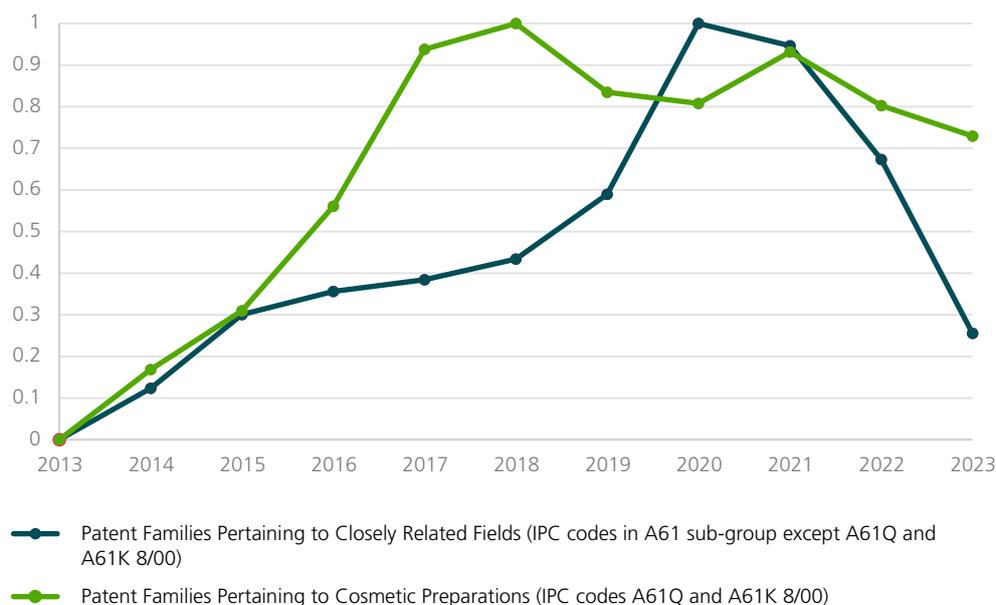


Figure 1 The International Patent Classification (IPC) is a classification system for patents organising them according to areas of technology to which they pertain. The graph shows a line plot displaying trends in patent families over the period 2013-2023 for IPC codes A61 (minus A61Q and A61K 8/00) vs IPC codes A61Q and A61K 8/00. IPC codes A61 correspond to patent families within the "medical or veterinary science and hygiene" field whilst IPC codes A61Q and A61K 8/00 are subsets of the A61 IPC group and correspond to patent families related to cosmetic preparations. The data was Min-Max normalised such that the bottom value and the top value for each data set was 0 and 1 respectively.

Key technology areas of growth in the cosmetic industry include **vegan cosmetics** driven by a rising awareness of animal cruelty in product testing and ingredient sourcing. Known in this area are large companies such as Amway Corp, Estee Lauder Companies, Rocher, L'Occitane, L'Oréal, LVMH, Unilever, Coty, but also smaller players such as Nature's Gate, Modern Mineral Makeup, Billy Jealousy, Beauty without Cruelty, Arbonne, Pacifica, MuLondon Organic, Ecco Bella, Bare Blossom, Zuzu Luxe, Emma Jane Cosmetics.⁵

5 [Vegan Cosmetics Market - Report & Production Statistics \(coherentmarketinsights.com\)](https://www.coherentmarketinsights.com)

There has also been an increased interest in **microbiome-based skincare products**. Notably, since 2020, L'Oréal has pursued a collaborative path by partnering first with biotech firm Microcos and, subsequently in 2022, with Korean original design manufacturer (ODM) COSMAX, with the goal of advancing microbiome research. Meanwhile, Givaudan considers itself a leader in the study of microbiomes, and has in-house microbiome research capabilities.

Other companies have expanded in the microbiome area by the acquisition of smaller beauty brands. For example, in 2022 Shiseido acquired Gallinée, a London-based beauty brand dedicated to caring for the skin's microbiome, which launched skin microbiome test kits.⁶ Shiseido also launched a probiotic powder as part of its renowned Ultimune hero product line. Also in 2022, German multinational company Beiersdorf acquired a majority stake in Belgian skin microbiome research company, S-Biomedic, after years of successful cooperation.⁷

The **men's beauty and personal care** market was valued at USD 202.6 bn globally in 2022 and is expected to grow at an annual rate of 8 percent until 2030. Skincare categories, driven by increased awareness among males regarding personal hygiene and grooming, led the men personal care market and accounted for a share of around 33.3% in 2022, according to data from Grand View Research.⁸

The use of **AI** in the cosmetic industry has also increased over the last 10 years, and it is predicted that more than 70% of beauty brands will be using AI for product development in 2025, according to a Gartner survey.⁹ AI enables brands to leverage consumer data to identify gaps and create innovative products. According to respondents of a Euromonitor International survey AI was the technology expected to have the greatest impact on the beauty and personal care industry in 2023 and beyond.¹⁰ Major players in this area include Beiersdorf (NIVEA skin guide), L'Oréal's (Modiface, Hair Coach), Olay (Skin Care App), CRIXlabs (DBA Quantified Skin), Procter & Gamble (Opte Wand), Yours Skincare, My Beauty Matches, EpigenCare Inc., mySkin, HautAI, Luna Fofo, Revieve, ANOKAI.CA. Youth Laboratories, Pure & Mine, Glory Skincare, Nioxin, Sephora Inc., Beiersdorf AG, and Shiseido Co. Other innovating brands include Kate Zone created by Japanese makeup brand Kate, an immersive experience based around virtual makeup, Malaysian beauty brand Arcta PHOS which has launched a shampoo enriched with AI-discovered peptides, and US-based InFLOWS has developed a gen-AI system to identify green, sustainable alternatives to harmful ingredients in cosmetics.¹¹

Future trends include **personalised cosmetics** to better suit individual mental and physical well-being – this could mean personalised supplement plans and skin care regimes. Practices like psychodermatology and neurocosmetics expected to gain traction with consumers around the world. Technology will play a vital role in this trend, including AI, VR/AR applications and wearable devices, for example to suggest innovative product formulas, precise skin analysis, smart mirrors etc. Innovating brands include US-based Image Skincare's Biome+ range, Lycopure, a Japanese brand centered around nutrition and cosmetics, IFF (Canada) – Regenight range, Peace & Pure (UK), Ashland – Caressence biofunctional, and Mibelle Biochemistry (Switzerland).¹²

Social media has an increasingly important impact social in terms of marketing, sales, and reach into new markets. Opportunities for collaboration with influencers and beauty bloggers allows brands to expand into new regions. In addition, online sales are expected to account for 18.5% of revenue in the Beauty & Personal Care Market in 2024.¹³

6 [Shiseido to acquire Microbiome Skincare Focused Brand Gallinée | NEWS RELEASE | Shiseido Company](#)

7 [Beiersdorf acquires S-Biomedic and strengthens expertise in the field of acne treatment | Beiersdorf](#)

8 [Men's Personal Care Market Size Report, 2022-2030 \(grandviewresearch.com\)](#)

9 [How AI And AR Are Enhancing The Beauty Space \(forbes.com\)](#)

10 [The Next 5 Years in Beauty: AI, Hero Ingredients, Pricing & More | Global Cosmetic Industry \(gcimagazine.com\)](#)

11 Mintel – 2024 Global BPC trends

12 Mintel – 2024 Global BPC trends

13 [Beauty & Personal Care - GCC | Statista Market Forecast](#)

Global trends for patent families over the last 10 years

Over the past 10 years, the key jurisdictions for cosmetic-related patent families were Asia, in particular China, Japan, Korea, and India, the United States, and Europe, followed by Latin America, in particular Brazil, Australia and Canada.

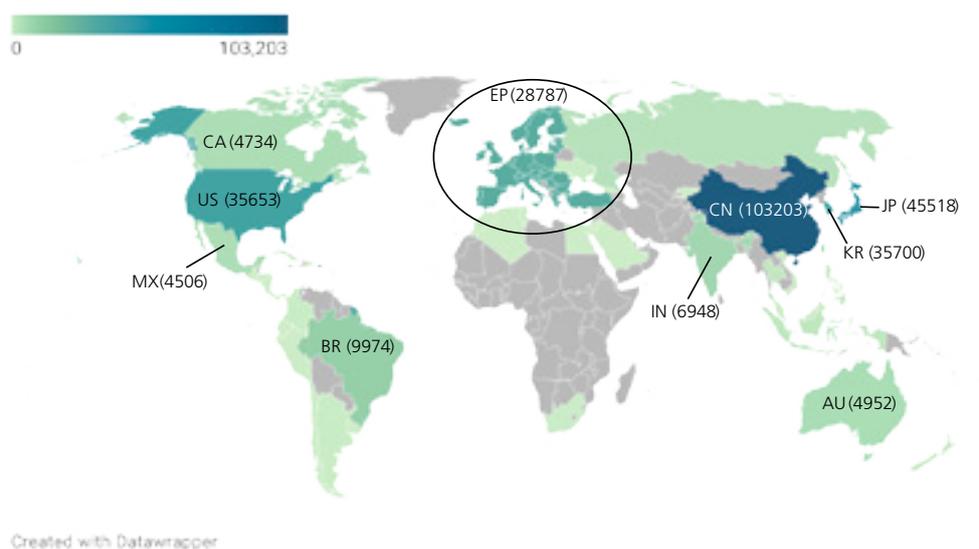


Figure 2: Patent Families relating to cosmetic preparations (IPC codes A61Q and A61K 8/00) worldwide during the period 2013 to 2023. EP refers to published patent families at the European patent office (EPO). Data for international patent families filed under the Patent Cooperation Treaty (PCT) (22473) are excluded along with national patent families filed in European jurisdictions. The number of published patent families is indicated in brackets for the top 10 jurisdictions. No data is provided for greyed out jurisdictions.

Taking a closer look at the European market, countries with the highest number of national patent families are France, Spain, Germany, followed by the UK and Poland (Figure 3A).

In Figure 3B, the data relating to the most prolific patent filers (top 100 companies with the most cosmetic patent filings worldwide) was removed to provide an understanding of jurisdictions targeted by smaller companies. Key jurisdictions are Spain, France, and Poland, followed by Germany, the UK and Denmark.

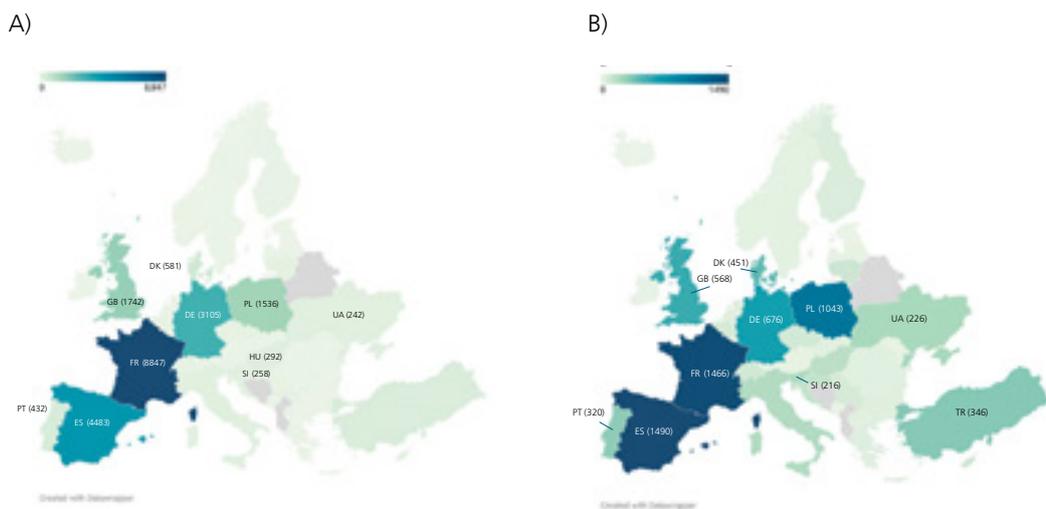


Figure 3: Published patent families relating to cosmetic preparations (IPC codes A61Q and A61K 8/00) in Europe during the period 2013 to 2023. For the purposes of these maps, Europe was considered as countries within the European economic area (EEA) as well as GB, UA, CH, RS, MK, NO, MD, ME, IS, and SM. The number of published patent families is indicated in brackets for the top 10 jurisdictions. No data is provided for greyed out jurisdictions. A) The map shows the total number of published patent families. B) The map shows the total number of published patent families excluding those made by the 100 companies with the most cosmetic patent filings worldwide.

These key jurisdictions for patent filings match up with the main beauty markets. In 2023, the key markets included¹⁴:

Region	2023 Market Share
North America	29%
North Asia	29%
Europe*	24%
SAPMENA – SSA*	9%
Latin America	9%

* The main European cosmetic markets are Germany, France, the UK, Italy, Spain and Poland.

** South Asia Pacific – Middle East – North Africa - Sub-Saharan Africa.

Asia, North America and Europe are expected to remain the main beauty markets. However, as noted in the report published by McKinsey in 2023¹⁵, a slowing growth in China's beauty market has been observed, and the US market expected to be the biggest growth driver for multinational beauty brands over the next few years.

In addition, India and the Middle East are key markets on the rise and are capturing attention of many beauty players. Additionally, Africa is an emerging market led by an incredible demographic growth. Multinational companies are looking at the region with interest, and at the same time local brands are gaining recognizability.

Thus, it is no longer as effective to target a handful of countries with particular emphasis on China. In recent years, some South Korean brands have ceased Chinese operations, and others, like L'Oreal are adapting their local strategies. In addition, whilst the US market is expected to be biggest growth driver for multinational beauty brands over the next few years, achieving scale in the US is increasingly difficult due to intense competition.

14 [Breakdown of the cosmetic market worldwide by geographic zone 2023 | Statista](#)

15 [The beauty market in 2023: New industry trends | McKinsey](#)

The main actors on the patent stage

Ten years ago, 100 companies were responsible for over half of the total cosmetic patent family filings in the world. Over the years, this trend has changed with a sharp rise in cosmetic patent family filings by smaller players, peaking in 2018 and remaining high since (Figure 4). In contrast, the number of cosmetic patent family filings by the top 100 most prolific filers has slowed down. As a result, about two thirds of cosmetic patent family filing in the world are filed by smaller companies.

Worldwide Patent Families in the Cosmetic Field for Top 100 Filers Combined vs All Other Companies Combined

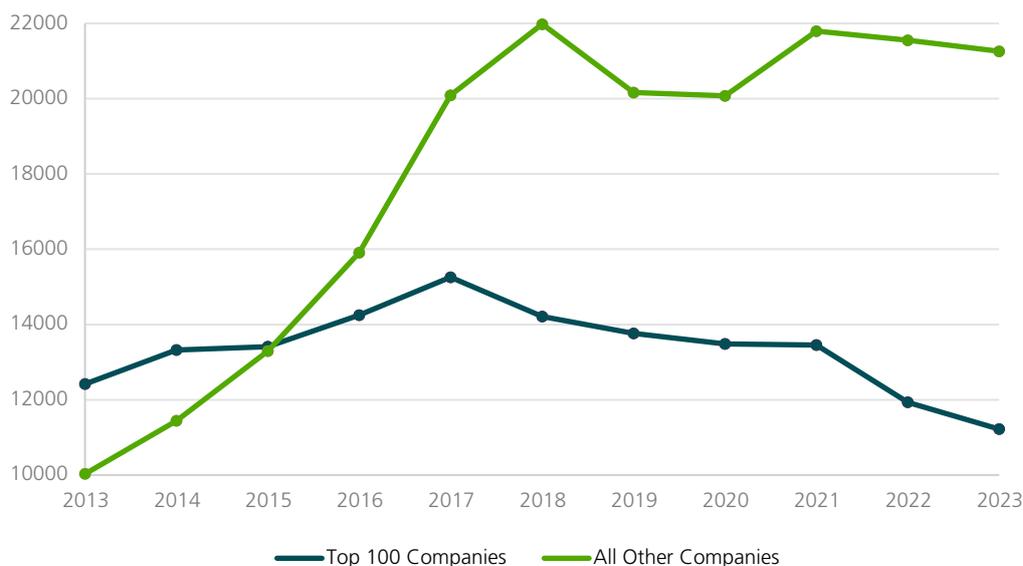


Figure 4: Line plot displaying the total number of patent families worldwide for top 100 filers combined vs all other companies combined over the period 2013 to 2023.

Predictably, the largest companies in the beauty industry filed the most patent families relating to cosmetic preparations (IPC codes A61Q and A61K 8/00) between 2013 and 2023 (Table 1).

Top 10 filers of cosmetic patent families worldwide (2013 - 2023)

	AMOREPACIFIC CORP		LG CORP
	BASF SE		L'OREAL SA
	COLGATE PALMOLIVE CO		PROCTER & GAMBLE CO
	HENKEL AG & CO KGAA		SHISEIDO CO LTD
	KAO CORP		UNILEVER GROUP

Figure 5: Top 10 filers worldwide of patent families for cosmetic preparations (IPC codes A61Q and A61K 8/00) during the period 2013 to 2023, arranged alphabetically.



Patent protection considerations in the cosmetics industry

As highlighted in the data shown in this article, cosmetic companies are strong users of the patent system worldwide, and this trend is rising for smaller companies. It is therefore of paramount importance for cosmetic companies to consider their intellectual property early on to ensure adequate protection of the innovation assets.

Why get a patent?

A patent grants the patent holder the legal authority to take action against anyone who exploits the claimed invention without permission. However, the process of obtaining a patent can be expensive and time-consuming, creating an initial hurdle particularly for smaller companies.

What else can a patent do? Patents can enable companies to differentiate their products from competitors and establish market presence. Championing a “patented” formula on a product’s packaging can not only deter potential imitators, but also attract consumers who perceive it as a sign of quality/ efficacy. Indeed, companies frequently publicise their patent portfolios to emphasise their status as industry leaders and innovators.

Aside from boosting product sales, patents can also serve as beacons for potential investors. Often investors consider it requisite that companies have endeavoured to protect their intellectual property. Moreover, patents also open up the opportunity for licensing agreements, providing businesses with new avenues for revenue.

Whilst obtaining (and enforcing) a patent can be expensive and time-consuming, smaller businesses are eligible for the ‘Patent Box’ which is a tax incentive scheme offered by a number of countries. The ‘Patent Box’ scheme is designed to encourage businesses to develop and retain their intellectual property by offering a reduced tax rate on profits derived from the exploitation of patented inventions. This includes income relating to the sale of patented products, but also income relating to licensing out or selling patent rights, infringement income and compensation related to patent rights.

What can be patented?

In the cosmetics industry, patents can be obtained for a range of innovations, spanning many areas of technology. These include ingredients, ingredient combinations, and formulations, as well as manufacturing processes that improve, for example, product quality or yield. It is also possible to patent new packaging solutions or delivery systems, for example that enhance the efficacy or stability of active ingredients.

The patenting process

The process of obtaining a patent can take between 1 and 5 years. Usually, a patent application is drafted by a patent attorney. This details the invention, sets out what the applicant is seeking to protect, and where possible, includes exemplary data that highlights the invention's advantages. The scope of the protection that is sought is then examined by a patent office. Once the patentability criteria are deemed met by the patent office, a patent is granted. To obtain patent protection in multiple jurisdictions, the same process is carried out before each of the national or regional patent offices.

The trade-off that comes with obtaining patent protection is that the invention be fully disclosed to the public. Thus, the content of a patent application is published 18 months after filing, unless the application is withdrawn prior to publication with sufficient notice to the patent office. Therefore, it is important to address the pros and cons that come with this compromise, taking into consideration the possibility to keep the innovation as a trade secret.

Methodology:

Data on the number of patent families between 1 January 2013 and 31 December 2023 was acquired using Patseer.

The IPC codes used to filter the searches were:

A61K 8/00: "Cosmetics or similar toiletry preparations" and

A61Q: "Specific use of cosmetics or similar toiletry preparations"

The search function "APY" was used to return the year of the earliest application within a patent family.

PatSeer integrates two types of Families in its results. Simple Family (SFAM) and Extended Family (EFAM). An SFAM comprises records that have exactly the same priority or same combination of priorities. SFAM members can be interpreted as records that in all probability protect exactly the same invention. An EFAM includes records that contains all records that are directly or indirectly linked to at-least one common priority. EFAM members can be interpreted as records that protect the same and also related inventions by the same applicant.

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